

MAR 16 2016

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UNITED STATES HOUSE OF REPRESENTATIVES
FINANCIAL DISCLOSURE STATEMENTFORM B
For New Members, Candidates, and New Employees

LEGISLATIVE SECRETARIAT OF THE U.S. HOUSE OF REPRESENTATIVES

Name: Jeffrey Earle Stone

Daytime Telephone: _____

2016 MAR 21 AM 10: 36

FILER STATUS

New Member of or Candidate for U.S. House of Representatives
State: California District: 36
Candidates -- Date of Election: November 8, 2016

Check if Amendment

New Officer or Employee
Employing Office: _____

Period Covered: January 1, 2015 to March 10, 2016

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child:

- a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period?
- or
-
- b. Make more than \$200 in unearned income from any reportable asset during the reporting period?

Yes ☒No ☐

E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?

Yes ☒No ☐

- C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?

Yes ☒No ☐

F. Did you have any reportable agreements or arrangements with an outside entity during the reporting period or in the current calendar year up through the date of filing?

Yes ☒No ☐

- D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?

Yes ☒No ☐

J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?

Yes ☐No ☒

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"

THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or your dependent child?

Yes ☐No ☒

EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

Yes ☐No ☒

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Use additional sheets if more space is required

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EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2014 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$26,955. The 2015 limit is \$27,225. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

[illegible]

SCHEDULE D – LIABILITIES

Name: Jeffrey E. Stone

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A \$10,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Liability)
	<i>Example</i>	5/98	Mortgage on Rental Property, Dover, DE				X							
	California Bank and Trust	8/14	Mortgage on Rental Property, 29061 Calle De Buhio		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 38807 Calle De Sesta		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 38013 Via Vela		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28948 Via Plaza Del Rey		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28841 Via La Calma		X									

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization

SCHEDULE D - LIABILITIES

Name: Jeffrey E. Stone

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				\$10,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Liability)
	Example	5/98	Mortgage on Rental Property, Dover, DE				X							
	California Bank and Trust	7/12	Mortgage on Rental Property, 41638 Eastman #A & #C				X							
	California Bank and Trust	12/14	Mortgage on Rental Property, 33414 Susan Grace Court						X					
	California Bank and Trust	9/14	Mortgage on Rental Property, 38216 Via Del Lago		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28720 Via El Avion		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28885 Via Rola		X									

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SCHEDULE D – LIABILITIES

Name: Jeffrey E. Stone

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	Example First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							
	California Bank and Trust	9/14	Mortgage on Rental Property, 28942 Via La Espalda		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 38338 Via La Paloma		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28770 Via Playa Del Rey		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28880 Via Norte Vista		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28945 Via La Rueda		X									

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SCHEDULE D - LIABILITIES

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	Example	5/98	Mortgage on Rental Property, Dover, DE				X							
	California Bank and Trust	9/14	Mortgage on Rental Property, 28691 Via El Avion		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 38620 Via Azul		X									
	California Bank and Trust	9/14	Mortgage on Rental Property, 28972 Via Playa Del Rey		X									
	PNC	3/07	Mortgage on Rental Property, 2777 Paradise 2804						X					
	Bank of America	6/09	30865 Bel Monte Ct. East						X					

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SCHEDULE D – LIABILITIES

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	Example First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							
	Leslie Cutler	5/14	Mortgage on Rental Property, 38332 Via La Collina			X								
	Mandi Gale	5/14	Mortgage on Rental Property, 38332 Via La Collina			X								
	Leslie Cutler	5/14	Mortgage on Rental Property, 28965 Via Princessa		X									
	Mandi Gale	5/14	Mortgage on Rental Property, 28965 Via Princessa		X									
	Andy and Tom Cole	2/10	Personal loan			X								

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SCHEDULE D – LIABILITIES

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	Example First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							
	Leslie Cutler	5/14	Mortgage on Rental Property, 38099 Calle de Amor			X								
	Mandi Gale	5/14	Mortgage on Rental Property, 38099 Calle de Amor			X								
	Leslie Cutler	5/14	Mortgage on Rental Property, 38283 Calle Quedo			X								
	Mandi Gale	5/14	Mortgage on Rental Property, 38283 Calle Quedo			X								
	California Bank and Trust	11/14	Mortgage on Rental Property, 33413 Susan Grace Court						X					

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Position	Name of Organization
Partner	Innovative Compounding Pharmacy
Officer	Innovative Compounding Pharmacy
Trustee	Nanomed LLC
Trustee	Dalrose LLC

SCHEDULE F – AGREEMENTS

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
03/16	Myself and State of California Public Employees Retirement System	Continued participation in pension

SCHEDULE J – COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Source (Name and City/State)	Brief Description of Duties
Example: Doe Jones & Smith, Hometown, Homestate	Accounting Services

Name: Jeffrey E. Stone

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Use additional sheets if more space is required.